

**Instructions (delete once plan is complete):** This template is your guide in creating a long-form business plan. The headings in each section should remain as-is, while the text below informs your team what to write under each heading. Replace that text with your company's information taken from your previously created mission statement and business model canvas. When every section has been updated, you have created a lean business plan.

# Company Name

Year



# Executive Summary

President's responsibility.

This is a summary of the entire business plan.

Must include: brief product description, who is on your team and what roles do they have (refer to Appendix A), fixed costs, variable costs, breakeven point (in dollars), sales goal (in dollars and units), final share value if you meet your sales goal, return on investment (ROI).



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## Value Proposition

### To be completed by the President

Use Mission Statement previously created and Value Proposition section of Business Canvas.

## 1.1 Company Mission

*“[Your mission statement]”*

[Your company name], a JA Canada Company

## 1.2 General Information

Legal Name: *Company name*, a JA Canada Company Business

Address: School OR Room, Street Address

Type of Business: Corporation

Incorporation Date: When did you apply for incorporation?

## 1.3 Business Profile

### Type of Business

*Company name* is a private corporation. Common Shares were issued to gain the starting capital.

### Major Goods

What product do you intend to sell? Give a brief description, which includes the unique qualities of your product (colors, sizes, etc.) 1 paragraph, 2-3 lines.

## Marketing Plan

### To be completed by the VP Marketing

Use Marketing Channels and Customer Relationships section of Business Canvas

## 2.1 Goals and Objectives

What are your goals/objectives when it comes to marketing your product (Ex. Sales goal, trade shows, incentives, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

## 2.2 Marketing Strategy

### Target Market

Who will buy your product (age ranges, gender, location, etc.)? Why? Does your market research support this (refer to section 2.4)?

### Product

Use Value Proposition section of Business Canvas

What is your product? Describe in detail. What makes your product different from others in the market? Why is it unique? What packaging are you using? Refer to Appendix D.

### Price

How much will each product cost? Why do you feel that is a good price? Justify based on specific competitor's prices.

### Place

Where will you be selling your product/service (ex. Trade shows, corporate trade fairs, schools, door-to-door, etc.)? What are you going to do to ensure best presentation of your product?

### Promotion and Advertising

How are you going to promote your products? Slogans? Displays? Word-of-mouth? TV/Radio ads? What type of promotion/advertising would be successful for you and why?

## 2.3 Budgets/Sales Forecasting

How many units of product/service do you plan on selling per week and in total? How many will each member sell per week? How many at tradefairs?

Include a table for Sale Forecast (how many products will each member sell per week, total for that week in units and dollars). Refer to the Company Program Record Keeping Spreadsheet.

## 2.4 Market Research

Include all the possible information from your market research that explains why you chose your product. What questions were asked? What conclusions did you make? [Optional: Create graphs and tables indicating the number of people interviewed and their answers. Include a legend and a description of each graph or table.]

## **Production Plan**

### **To be completed by various team members**

Use the Key Activities section of your Business Canvas to complete this section

### **3.1 Goals and Objectives**

What are your goals/objectives when it comes to producing your product (Ex. Production goal, product quality [what is high quality to you?], efficiency, environmental considerations, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

### **3.2 Facilities and Labour**

Where are you making the product? Who is making the product (VPs or non-VPs)? 1 paragraph, 4-6 lines.

### **3.3 Materials Procurement**

Where are you buying the materials for your product? Who is responsible for picking them up/buying them? 1 paragraph, 3-5 lines. Include the contact info of your possible suppliers. For example:

Any store  
12345 – 123 St  
Any town, Province  
www.anystore.com

### **3.4 Production Process**

How are you making your product? What are the steps involved? Describe the steps in detail with specific materials/measurements. We should be able to put your product together after reading this.

### **3.5 Training**

Who is responsible for training your members in the production process? How will they be trained? What date did training happen? What are the safety issues when producing your product? How will you prevent accidents? 1 paragraph, 8-12 lines.

### **3.6 Quality Control**

How do you insure that each product is made with the same quality? Describe what a high-quality product looks like. 2 paragraph, 5-8 lines.

### 3.7 Inventory Control

How will you keep track of all: Materials inventory, products not yet completed, products already completed? 1 paragraph, 5-8 lines.

### 3.8 Research & Development

How will you improve your product? Who is responsible for doing that? How will you determine what needs to be improved? 1 paragraph, 5-8 lines.



## Human Resources

To be completed by the VP Human Resources

### 4.1 Objectives

What are your goals/objectives when it comes to keeping a well-run team (Ex. Attendance, compensation, retention, social entrepreneurship, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

### 4.2 Compensation Plan

What salaries and wages are you paying your employees? Ensure that they meet minimum wage standards. Are you paying commission? Is there another form of compensation you are using? 1 paragraph, 4-6 lines.

For example:

#### **Executives**

Salary	\$3.00/week
Commission	10% on all personal sales

#### **Officers**

Wages	\$1.00/hour for minimum 2.5 hours
Commission	10% on all personal sales

### 4.3 Training

How will all the members of your company be trained (production, marketing, etc.)? Officer orientation does NOT count as training. Who is responsible for each training session? What day(s) did training occur? 1 paragraph, 5-8 lines.

### 4.4 Staff

Include the Company Information sheet from the Company Program Record Keeping Spreadsheet.

Attach a company photo and organizational chart in Appendix A.

## Financial Plan

To be completed by the VP Finance

### 5.1 Goals and Objectives

What are your goals/objectives when it comes to your company's finances (Ex. Financial goals, return to shareholders, timely payments, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

### 5.2 Initial Capitalization

How many shares did your company sell (number and dollar value)? How much money do you need to start your company? Why? What are your specific costs of capitalization (initial material purchases, initial promotional materials, etc.) that this money will cover? 1 – 2 paragraphs, 6-9 lines.

### 5.3 Break-Even Analysis

What are your fixed costs? What are your variable costs? What is your breakeven point in dollars and units? Use the calculations found in your breakeven spreadsheet in the Company Program Record Keeping Spreadsheet. 1 paragraph, 3-5 lines.  
Attach the breakeven spreadsheet from the Company Program Record Keeping Spreadsheet and a breakeven analysis graph (that you create) in Appendix C.

### 5.4 Financial Statements

#### Income Statement

Attach your Income Statement Forecast (the Budget from the Company Program Record Keeping Spreadsheet) in Appendix D. Ensure that there are NO entries in your financial worksheet at this time so that the "Actual" and "% of Budget achieved" columns are empty.

#### Balance Sheet

Attach FORECAST Balance Sheet in Appendix D (what your Balance Sheet will look like after you meet your sales goal but before you liquidate). You can use the same format as the Balance Sheet in the Company Program Record Keeping Spreadsheet, but you will need to input in values in each area OUTSIDE of the Company Program Record Keeping Spreadsheet.

### 5.5 Risks

What financial risks are involved in making and selling this type of product? How much money could you lose? What would happen to your shareholders? 1 paragraph, 5-8 lines.

## **IT Plan**

**To be completed by the VP IT**

### **6.1 Goals and Objectives**

What are your goals/objectives when it comes to utilizing technology (Ex. Record keeping, templates, web site, etc.)? List up to 5 SMART goals. Each goal must have up to 3 specific actions you will take to ensure the goal is met.

### **6.2 Record Keeping**

How are you going to get all information from other areas? What specific time(s) will you be collecting this information? How are you going to ensure that data is safe and confidential? What will you do with the paper copy of the record? How will you ensure the information is accurate? 1-2 paragraphs.

### **6.3 Online Tools**

What specific online tools will your company utilize? Website? Email? Social media (working with VP Marketing)? 1-2 paragraphs.

## Appendices

### Appendix A

Team photo with names

Company organizational chart (with names and roles) OPTIONAL: Executive team photos and bios

## Appendix B – Please customize

### Trade Show Booth Checklist

- ☐ Have We Booked our Backdrop?
- ☐ Are all Promotional Items Prepared?
- ☐ Company Name Sign
- ☐ Price Sign
- ☐ Seasonal/ Theme Decorations
- ☐ Enough Staff Booked?
- ☐ Have Staff Received Sales Training?
- ☐ Enough Products to Sell?
- ☐ Do We Have All Necessary Materials?
- ☐ Sales Slips
- ☐ Pens & Pencils
- ☐ Float

## Appendix C

Breakeven Analysis page from the IT System (instructions may change based on what teams use)

Breakeven Analysis graph (created by you)

## Appendix D

(These instructions will change based on what system the teams use.)

**Income Statement Forecast** (the Budget from the IT System).

Ensure that there are NO entries in your financial worksheet at this time so that the “Actual” and “% of Budget achieved” columns are empty.

**Balance Sheet Forecast** (what your Balance Sheet will look like after you meet your sales goal but before you liquidate). You can use the same format as the Balance Sheet in the IT System, but you will need to input in values in each area OUTSIDE of the IT System.

## Appendix E

Product photographs (please show products to scale, different colors, variations, etc.)